



# Do You Have Your Financial Plan?

*Discover what you need to know to prepare for a secure retirement income.*

Whether you are just beginning the financial planning process or have already laid the foundation and are building a secure retirement future, CalPERS has a **Free Financial Planning Seminar** that will meet your needs.

If you are more than 10 years away from retirement:

**Achieving Financial Security    8:30 AM – 3:45 PM**

If you are 10 or less years away from retirement:

**Retirement and Estate Planning    8:30 AM – 3:45 PM**

## *Topics Include:*

- *CalPERS Benefits*
- *Financial Planning (goal-setting, budgets, spending, saving, increasing retirement income)*
- *Insurance*
- *Investment Basics and Strategies*
- *Estate Planning*

It's easy to register. Find a date and location on the attached schedule, then do one of the following:

- **Call Toll Free 888 CalPERS (or 888-225-7377)**
- **Mail or fax the completed registration form to your local CalPERS Regional Office. (FAX numbers located on Registration Form)**
- **View the schedule and register online using your User ID at [www.calpers.ca.gov](http://www.calpers.ca.gov)**

# July 2006- December 2006 DATES AND LOCATIONS OF FINANCIAL PLANNING SEMINARS

AFS = Achieving Financial Security

REP = Retirement and Estate Planning

## CalPERS Regional Offices

### Sacramento Office

#### **SACRAMENTO**

**AFS** – Aug 3, Aug 21,  
Sept 16, Sept 29

**REP** - Aug 7, Aug 26, Aug 31,  
Sept 8, Sept 12, Sept 22,  
Sept 28

#### **OROVILLE**

**REP**- Aug 2

#### **REDDING**

**REP**- Aug 9

#### **STOCKTON**

**REP**- Sept 26

**AFS**- Sept 27

#### **MARYSVILLE**

**REP**- Sept 13

### Fresno Office

#### **FRESNO**

**AFS**- Aug 15

#### **BAKERSFIELD**

**REP**- Sept 20

#### **MONTEREY**

**REP**- Aug 8

### San Bernardino Office

#### **SAN BERNARDINO**

**REP**- Aug 2, Sept 8

### San Francisco Office

#### **SAN FRANCISCO**

**REP** – Aug 3, Sept 14

**AFS** – Aug 4

#### **CRESCENT CITY**

**REP**- Aug 22

#### **ARCATA**

**REP**- Aug 23

#### **VACAVILLE**

**AFS**- Aug 17

**REP**- Aug 18

#### **SANTA ROSA**

**AFS**- Sept 28

**REP**- Sept 29

### San Jose Office

#### **DALY CITY**

**REP**- Sept 19

#### **GILROY**

**REP**- Aug 14

#### **SAN JOSE**

**REP** - Aug 4, Sept 21

**AFS**- Aug 28

#### **SANTA CRUZ**

**REP**- Aug 29

### Orange Office

#### **ORANGE**

**REP** - Sept 13

**AFS**- Sept 27

### Glendale Office

#### **GLENDALE**

**AFS** - Aug 9, Sept 15,  
Sept 30

**REP** - Aug 16, Aug 25,  
Sept 13, Sept 23

#### **COVINA**

**AFS**- Aug 23

#### **LOS ANGELES**

**REP**- Sept 29

#### **MORRO BAY**

**AFS**- Aug 11

**REP**- Aug 12

#### **SANTA BARBARA**

**REP**- Aug 5, Aug 31

#### **SANTA MONICA**

**AFS**- Aug 24

#### **SIMI VALLEY**

**REP**- Aug 18

#### **WHITTIER**

**AFS**- Sept 12

#### **VENTURA**

**REP**- Aug 30

### San Diego Office

#### **SAN DIEGO**

**AFS**- Aug 16

**REP**- Aug 17, Aug 18

No seminars are scheduled  
Oct-Dec 2006

Schedule subject to change  
Revised 8/1/06



# FINANCIAL PLANNING SEMINAR REGISTRATION

## SECTION I: CalPERS Regional Offices

<b>SACRAMENTO</b> 400 Q Street, Lincoln Plaza East Suite 1820 Sacramento, CA 95814 FAX (916) 795-7878	<b>SAN FRANCISCO</b> 301 Howard St. Suite 2020 San Francisco, CA 94105 FAX (415) 369-8501	<b>GLENDALE</b> 655 North Central Ave. Suite 1400 Glendale, CA 91203 FAX (818) 662-4304	<b>SAN BERNARDINO</b> 650 East Hospitality Lane Suite 330 San Bernardino, CA 92408 FAX (909) 806-4820
<b>FRESNO</b> 10 River Park Place East Suite 230 Fresno, CA 93720 FAX (559) 440-4901	<b>SAN JOSE</b> 181 Metro Drive Suite 520 San Jose, CA 95110 FAX (408) 451-8001	<b>ORANGE</b> 500 No. State College Blvd. Suite 750 Orange, CA 92868 FAX (714) 939-4701	<b>SAN DIEGO</b> 7676 Hazard Center Drive Suite 350 San Diego, CA 92108 FAX (619) 220-7201

**To Register: Call 888 CalPERS (or 888-225-7377) or Mail/FAX Form to Appropriate CalPERS Office**

\*Privacy Statement: Providing the Social Security Number is voluntary in accordance with the Information Practices Act of 1977 and the Privacy Act of 1974 (PL93-679). If provided, the Social Security Number may be used by departments to maintain records of training requested and attended by members.

## SECTION II: Seminar Information

<b>CHECK ONE</b>	<input type="checkbox"/> <b>ACHIEVING FINANCIAL SECURITY</b>	<input type="checkbox"/> <b>RETIREMENT &amp; ESTATE PLANNING</b>
<b>BOX ONLY:</b>	<b>(For members more than 10 years from retirement)</b>	<b>(For members 10 or less years from retirement)</b>
<b>First Choice</b>	<b>Date</b>	<b>Location</b>
<b>Second Choice</b>	<b>Date</b>	<b>Location</b>
<b>Third Choice</b>	<b>Date</b>	<b>Location</b>

## SECTION III: Member Information

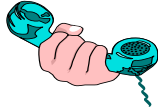
<b>Member's Social Security No.:</b>	<b>Member's Name:</b> Last First (Print or Type)
<b>Employer:</b>	
<b>Disability Accommodation:</b>	<input type="checkbox"/> Auditory <input type="checkbox"/> Mobility <input type="checkbox"/> Visual <input type="checkbox"/> Other
<b>Type of Accommodation Needed (Please specify):</b>	

## SECTION IV: Spouse/Partner Information

<b>Will Spouse/Partner Attend?</b> <input type="checkbox"/> YES	<b>Is Spouse/Partner a CalPERS Member?</b> <input type="checkbox"/> YES	(If YES, complete this section)
<b>Spouse/Partner's Social Security No.:</b>	<b>Spouse/Partner's Name:</b> Last First (Print or Type)	
<b>Spouse/Partner's Employer:</b>		

## SECTION V: Enrollment Notification Information

<b>Where Should Enrollment Notification Be Sent?</b>	<input type="checkbox"/> to MEMBER <input type="checkbox"/> to EMPLOYER
<b>Employer's Name:</b>	<b>Daytime Telephone Number:</b>
<b>Division and ARU/MIC: (if applicable)</b>	
<b>Member's or Employer's Address:</b>	<b>Contact Person (if applicable)</b>
<b>City, State, and Zip Code:</b>	<b>Your Daytime Phone Number:</b>



## **QUESTIONS?**

**CALL TOLL FREE 888 CalPERS (or 888-225-7377)**

### **Notification of Enrollment**

An initial letter of enrollment notification will be mailed to the member.

A second notification letter with program materials will be mailed approximately two weeks before the seminar date.

### **Cancellations**

If you find that you will be unable to attend your scheduled seminar, please phone your cancellation to CalPERS at Toll Free **888 CalPERS** (or **888-225-7377**).

### **Additional Information**

For specific information regarding the seminars (facility, address, etc.), contact CalPERS at Toll Free **888 CalPERS** (or **888-225-7377**).

**CalPERS Web Site - [www.calpers.ca.gov](http://www.calpers.ca.gov)**

